



## **A Satellite Teleconference**

**Sponsored by the  
Texas Department of Health  
WIC Program  
May & June 2001**





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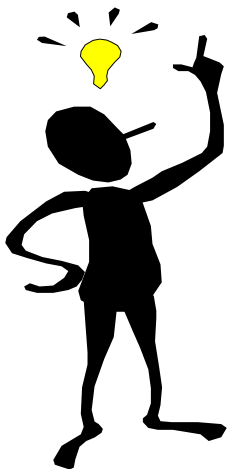
# TREATING CUSTOMERS AS GUESTS





# *A Culture of Service*

*Turning Customers  
and Coworkers  
....into "Guests"*



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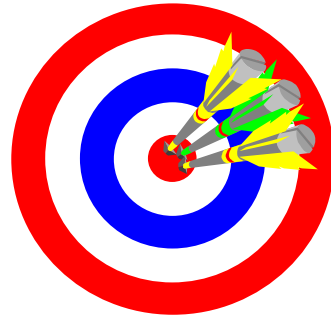


# *A Culture of Service:*

*It's very simple...*

*We all already know  
how... it's just...*

*“Doing  
What’s  
Right”*



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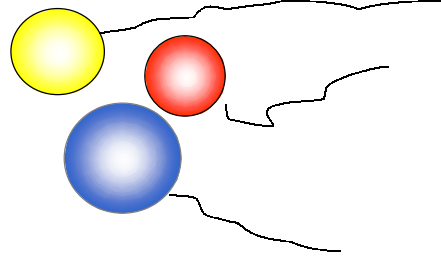
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Why is....  
  
**My Organization's  
Success...**  
**Important to...**  
**Me!**



**What role...**



**do your clients and**

**coworkers play**

**...in the success**

**of your**

**organization?**



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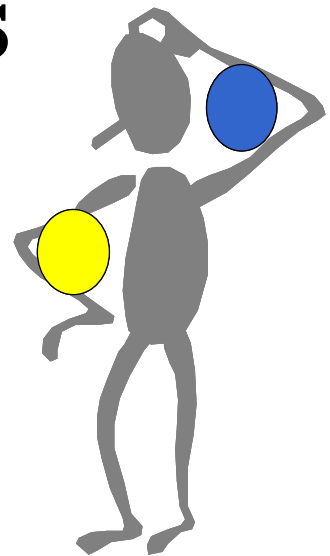
# *Who are our clients?*

“external” clients

“internal” clients

What causes:

“ex” clients?



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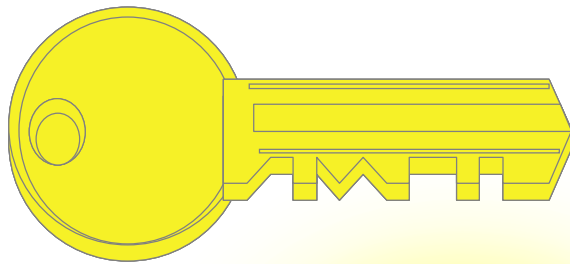
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**The Key to  
Success is:**

**Keeping  
Clients!**



r  
e  
m  
e  
m  
b  
e  
r

*“Customers...  
go where they  
want to go....  
....but stay....  
where they are  
appreciated.”*

Provided by: DC & Associates and ProConnection, Austin, Texas  
(512) 292 3400 / FAX 292 3400 and (512) 418 0248 FAX 418 0268

*Keeping clients profitable, productive and customer-focused*

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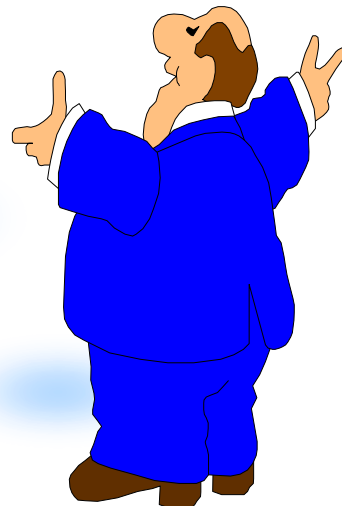
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Practicing....  
*What I already know  
about...“Great  
Customer Service”*





*“Excellence... is an Art won by training and  
habitation.*

*We are what we repeatedly do.*

Excellence, then, is not an act...  
but a habit.

—Aristotle

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# Reviewing the Five “Keys” to Turning Clients and Coworkers into “Guests”

Much of what I need to know about giving great customer service are things I already know and have known for a long time. The following are some of the things that I can “practice” to turn clients and coworkers into “Guests.”

*I welcome customers by:*

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

*I obtain and use customer names by:*

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

*I discover customer needs by:*

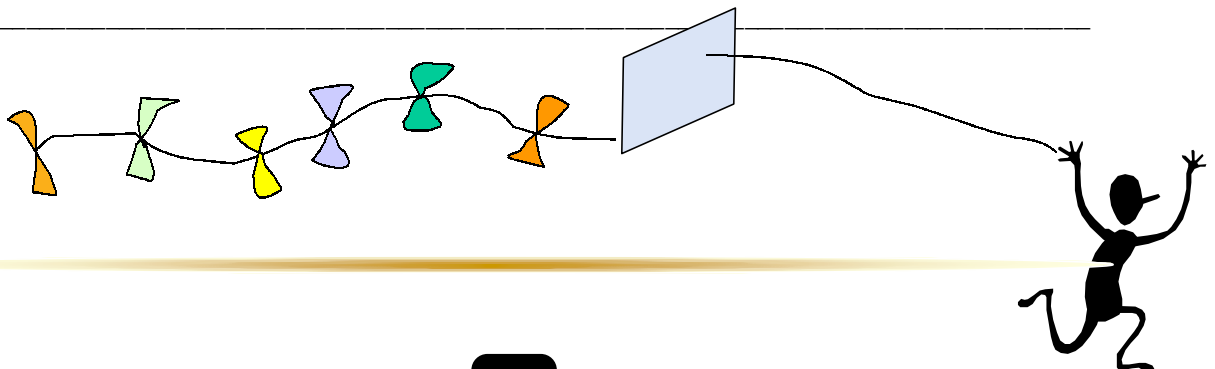
1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

*I thank my customers by:*

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

*I invite customers back by:*

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_





# Civil Rights: The Real Policy

## brought to you by . . .



These two policies were identified in the commercial you just saw. Please read the policies and answer the questions below.

Brought to you by *Fair Hearing Posters and Nondiscrimination Statements*.

### ***Civil Rights Policy: 02.0, Nondiscrimination***

**The same standards used for determining eligibility and participation in the WIC Program apply to everyone regardless of sex, age, disability, race, color and national origin.**

**The USDA poster “And Justice For All” and the Fair Hearing poster must be prominently displayed in WIC clinics.**

### ***Civil Rights Policy: 02.2, Nondiscrimination Statement***

**All locally developed materials concerned with outreach, program information, or participants’ rights that are distributed to the public or posted for public viewing must include a nondiscrimination statement in a prominent place on the materials.**

Questions:

1. Which of the following are required to be displayed prominently in the WIC clinic? (Mark all that apply.)
  - a) Lead Poisoning poster
  - b) Fair Hearing poster
  - c) And Justice For All poster
  - d) We Are Here to Serve You poster
2. Which of the following information is required on WIC outreach materials (Check all that apply.)
  - a) \_\_\_\_\_ All WIC vendors in the area
  - b) \_\_\_\_\_ A nondiscrimination statement
  - c) \_\_\_\_\_ Lists of nearby elementary schools
  - d) \_\_\_\_\_ WIC Director’s home phone number



# FRIENDLY TELEPHONE SERVICE





# FRIENDLY TELEPHONE SERVICE

## *Before You Even Pick Up the Phone*

- Attitude is Your Choice

- Be Friendly

- Tips

## *Focus on the Conversation*

- People Before Paperwork

- Control the Conversation

- Frustrated Callers



## ***Leave a Lasting Impression***

- Summarize
- Wrap-up Without Being Rude
- Leave a Lasting Impression





## TEST YOUR TELEPHONE HABITS

ALWAYS

USUALLY

SELDOM

1. Before leaving my phone, I leave word where I'm going and when I plan to return.			
2. I answer my own phone whenever possible.			
3. I answer promptly —before the third ring.			
4. I take care to speak directly into the phone —clearly, naturally and pleasantly.			
5. I identify myself at the beginning of the conversation whether I am taking or placing the call.			
6. I try to personalize my conversation by using the caller's name.			
7. I offer my help and assistance to the caller and transfer only when necessary.			
8. I apologize sincerely for customer inconveniences.			
9. When taking messages, I note all essential information and, if necessary, double check it.			
10. If it is necessary for the caller to wait longer than a minute while I leave the line, I offer to return the call.			
11. I thank the party for calling.			
12. I return all calls promptly.			
13. I treat all calls as important calls.			
14. I always keep a message pad and pencil handy at my phone.			
15. I try to visualize the person I'm speaking to, his or her surroundings, pressures, etc.			

● My biggest customer service challenge on the telephone is:



# Telephone Quiz

Treating customers professionally means being as pleasant over the phone as you are in person. Take the telephone quiz below and see if you can score 100%.

## TRUE or FALSE:

- 1)\_\_\_\_\_ It is okay to keep someone waiting on the phone while you attend to another equally important task.
- 2)\_\_\_\_\_ You should actually smile when you answer the telephone.
- 3)\_\_\_\_\_ If nobody is around to answer a ringing phone and it is not your assigned job, the best thing to do is let it ring.
- 4)\_\_\_\_\_ It is acceptable to not return a call. If the call was important, the calling party will try again.
- 5)\_\_\_\_\_ If a customer is rude, it is your right to be equally snippy.
- 6)\_\_\_\_\_ You should identify yourself by name when answering a business related telephone call.
- 7)\_\_\_\_\_ If clinic activity is slow, it is perfectly acceptable to make personal calls to your friends.
- 8)\_\_\_\_\_ It is important to communicate a sincere interest in the caller and the information that is being requested or provided.
- 9)\_\_\_\_\_ The conversation should be ended in an upbeat manner, with a summary of any action to be taken.
- 10)\_\_\_\_\_ When you are upset, it is possible to communicate a negative attitude over the phone without realizing it.

Answers: 1:F 2:T 3:F 4:F 5:F 6:T 7:F 8:T 9:T 10:T
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Adapted from: Martin, W. B. (1993). Quality Customer Service (3<sup>rd</sup> ed.). California: Crisp Publications.



# Civil Rights: The Real Policy

## brought to you by . . .



This policy was identified in the commercial you just saw. Please read the policy and answer the question below.

Brought to you by *International Music Sensation, Wicky Moreton*.

***Civil Rights Policy: 02.1, Providing Oral and Written Program Information to Non-English or Limited-English Speaking Persons***

**Each local agency should make arrangements to provide program information to persons who do not speak English or who have limited English-speaking proficiency. Program information should be provided to such person in the appropriate language and/or in writing.**

**The local agency should either hire bilingual staff members or interpreters to serve non-English-speaking or limited-English-speaking persons. Program materials should be developed in languages that can be utilized by the local WIC populations.**

**Question:**

If a Spanish-speaking applicant brings her 10-year-old son with her to the clinic to interpret, WIC staff should:

- a) use the 10-year-old son as the interpreter
- b) get a Spanish-speaking staff person to interpret
- c) do not allow the 10-year-old son to interpret and speak loudly to the applicant
- d) ignore the applicant



# CUSTOMER FRIENDLY CLINICS





## **CUSTOMER FRIENDLY CLINICS**

### **Why worry about customer service?**

- **Isn't 99% quality service enough?**

- **What's different about our clients?**

### **One-size-fits-all doesn't apply**

- **The needs of moms, families, & children.**

- **Quality service adapts to the client.**



## ***What Our Clients Want — The House Rules***

- Notice when someone looks confused.
- Take time for courtesy & consideration.
- Keep people informed.
- Anticipate needs.

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### **● Activity**

**Now take 3 minutes to discuss how you will actively use these “House Rules” in your clinic. Write down some of your ideas.**



## ***What Our Clients Want — The House Rules***

- **Respond quickly.**
- **Listen and act.**
- **Take the initiative.**
- **Help each other.**

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### **● Activity**

**Now take 3 minutes to discuss how you will actively use these “House Rules” in your clinic. Write down some of your ideas.**



## ***What Our Clients Want — The House Rules***

- **Maintain dignity.**
- **Handle with care.**
- **Maintain privacy and confidentiality.**
- **Treat clients as adults.**

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### **● Activity**

**Now take 3 minutes to discuss how you will actively use these “House Rules” in your clinic. Write down some of your ideas.**



- Consistency

## Customer-Focused Behavior

- 99.9% is just not enough.





# THE HOUSE RULES

## **1. Break the ice:**

Make eye contact, smile, say hello, introduce yourself, call people by name, and extend a few words of concern.

## **2. Notice when someone looks confused:**

Stop and lend a hand.

## **3. Take time for courtesy and consideration:**

Kind words and polite gestures make people feel special.

## **4. Keep people informed:**

Explain what you're doing. People are always less anxious when they know what is happening.

## **5. Anticipate needs:**

You often know what people want before they have to ask. Don't wait. Act.

## **6. Respond quickly:**

When clients are worried, a minute feels like an hour. Delays are frustrating.

## **7. Maintain privacy and confidentiality:**

Watch what you say and where you say it. Protect personal information.

## **8. Handle with care:**

Slow down. Imagine that you're on the receiving end.



# THE HOUSE RULES

(CONTINUED)

## 9. Maintain dignity:

Give choices to clients. Provide privacy. That client could be your child, your spouse, or your friend.

## 10. Take the initiative:

Just because something is not your job doesn't mean you can't help or find someone who can help.

## 11. Treat clients as adults:

Your words and tone of voice should show respect.

## 12. Listen and act:

When people complain, don't make excuses. Hear them out then do all you can to respond and help.

## 13. Help each other:

When you help your co-workers, you help clients, too.

## 14. Keep it quiet:

Noise annoys. Help everyone show consideration for others.

## 15. Apply telephone skills:

Sound pleasant. Be helpful. Listen with understanding.

## 16. Look the part:

Appearance, dress, and demeanor build others' confidence in all of us.

Leebov, W. (1990). Customer Service in Health Care. American Hospital Publishing, Inc.



M	F	K	E	E	P	I	N	F	O	R	M	E	D	Z
Y	L	K	C	I	U	Q	D	N	O	P	S	E	R	H
O	S	T	C	A	D	N	A	N	E	T	S	I	L	Q
X	W	Y	U	S	U	O	E	T	R	U	O	C	E	B
P	R	I	V	A	C	Y	V	B	F	L	X	S	Q	F
E	V	I	T	A	I	T	I	N	I	E	K	A	T	B
H	T	E	L	E	P	H	O	N	E	S	K	I	L	L
H	E	L	P	E	A	C	H	O	T	H	E	R	L	I
V	D	E	E	N	E	T	A	P	I	C	I	T	N	A
A	F	O	E	C	I	E	H	T	K	A	E	R	B	N
P	T	E	I	U	Q	T	I	P	E	E	K	Q	S	F
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C	O	N	F	I	D	E	N	T	I	A	L	I	T	Y
N	T	R	A	P	E	H	T	K	O	O	L	P	Z	X
Y	T	I	N	G	I	D	R	R	W	O	Y	J	W	A

**ANTICIPATE NEED**

**BREAK THE ICE**

**DIGNITY**

**KEEP INFORMED**

**LISTEN AND ACT**

**NOTICE CONFUSED**

**RESPOND QUICKLY**

**TELEPHONE SKILL**

**BE COURTEOUS**

**CONFIDENTIALITY**

**HELP EACH OTHER**

**KEEP IT QUIET**

**LOOK THE PART**

**PRIVACY**

**TAKE INITIATIVE**

**TREAT AS ADULTS**



# Civil Rights: The Real Policy

## brought to you by . . .



This policy was identified in the commercial you just saw. Please read the policy and answer the questions below.

Brought to you by *WIC-FOR-U Fair Hearing Spray*.

***Civil Rights Policy: 03.0, Fair Hearing Procedure for Applicants/Participants***

**If any individual wishes to appeal any state agency or local agency actions, the local agency shall refer that individual to the state agency.**

**Individuals may make an oral or written request for a “Fair Hearing” to the Director of the WIC Program in Austin, Texas.**

Question:

When an individual wishes to appeal a denial, where should the local agency refer that individual or their appeal request?

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# MULTI-TASKING

A Panel Discussion





# MULTI-TASKING

## A Panel Discussion

## Notes:

## Multi-tasking



This image shows a blank sheet of white paper with horizontal ruling lines. The lines are evenly spaced and extend across the width of the page. There are no margins, text, or other markings on the paper.



# Civil Rights: The Real Policy

## brought to you by . . .

Tex Stately  
Fake-Attorney-at-Law

These three policies were identified in the commercial you just saw. Please read the policies and answer the questions below.

Brought to you by *Tex Stately, Fake-Attorney-at-Law*.

***Civil Rights Policy: 04.1, Civil Rights Complaints***

**If any individual feels that his/her civil rights have been violated by actions that have resulted in the individual's denial of participation, harassment, suspension or termination from the program, that person has a right to register a complaint and may complain either in written or oral form to the local or state agency, Food and Nutrition Service Regional Office or the U.S. Secretary of Agriculture.**

***Civil Rights Policy: 05.0, Processing Civil Rights Violation***

**The state agency will send all complaints to the Regional Civil Rights Director of the Southwestern Regional Office of the USDA Food and Nutrition Service.**

***Civil Rights Policy: 06.0, Local Agency Processing of Participant Civil Rights Complaints***

**The local agency must immediately send all civil rights complaints to the state agency. The local agency will immediately notify the state agency that complaint information is forthcoming.**

**Questions:**

1. Where may an individual file a discrimination complaint?  
\_\_\_\_\_
2. Where should the state agency send all civil right complaints?  
\_\_\_\_\_
3. Where should the local agency send all civil right complaints?  
\_\_\_\_\_



# BEING PROACTIVE





# BEING PROACTIVE

## It's Out of My Hands — NOT!

### 1. Proactive vs. Reactive

**Proactive people** work on things they can do something about.

The nature of their energy is \_\_\_\_\_.

As a result, they can better control their \_\_\_\_\_.

**Reactive people** focus on the weaknesses of other people, the problems

in the environment, and circumstances over which they have not control.

Their focus results in \_\_\_\_\_.

The negative energy generated by that focus, combined with neglect in

areas they could do something about, makes them feel \_\_\_\_\_.

### 2. Response-Ability = the ability to \_\_\_\_\_ in stressful situations.

Proactive people do not blame others for their behavior. Their behavior is

a product of \_\_\_\_\_.



3. **Reactive people** are affected by their physical environment (the weather) as well as their social environment (“social weather”).

Reactive people build their emotional lives around the behavior of others, empowering the weaknesses of other people to control them.



*No one can hurt you without your consent.*

— Eleanor Roosevelt



## 5. Proactive Language

**Reactive:** “That’s me. That’s just the way I am.”  
*I have no control over my own behavior.*

**Proactive:** “Next time, I’ll choose a different approach.”

**Reactive:** “He makes me so mad!”  
*I’m not responsible. My emotional life is governed by something outside my control.*

**Proactive:** “I’m not going to let him get the best of me.”

**Reactive:** “I can’t do all that. I just don’t have the time.”  
*Something outside me — limited time — is controlling me.*

**Proactive:** “I’ll do what’s essential today, then prioritize the rest for tomorrow



**Reactive:** “If only my boss were more patient.”  
*Someone else’s behavior is limiting my effectiveness.*

**Proactive:** “I’ll show him how efficient I can be!”

**Reactive:** “I wish I didn’t have to go to work at that place!”  
*Circumstances or other people are forcing me to do what I do. I’m not free to choose my own actions.”*

**Proactive:** “Working here is my choice. I’ll make the best of it.”

**Reactive:** “That’s our policy. There’s nothing I can do about it.”  
*Something outside me — a rule or difficult procedure — won’t let me.*

**Proactive:** “Let me see what other options I can find.”



## 5. Activity

Watch the following examples on tape, then come up with a proactive way of handling the situation. Be prepared to share your proactive idea with the rest of our viewers.

a) Telling participant she can't get certified without proof of income.

b) Dealing with an angry participant.

c) Interviewing several participants in an open room.

## 6. Activity

With your group, identify one possible response from your participants, then draft an action plan to address it. Be prepared to share your plan with the rest of our viewers.

You may use the attached form for your action plan.



## Action Plan for Improved Customer Service

**What would make your visits to our clinic better?**

Response: \_\_\_\_\_

Possible causes: (Brainstorm all possible causes)

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Possible solutions: (Brainstorm, then narrow down to three most-feasible solutions)

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Chosen solution: \_\_\_\_\_

Further information or action needed: \_\_\_\_\_

Person responsible for action: \_\_\_\_\_

Target date for action/implementation: \_\_\_\_\_

Follow-up discussion needed? \_\_\_\_\_ Date: \_\_\_\_\_

Target date for evaluation: \_\_\_\_\_

Criteria for evaluation (How will we know it worked?) \_\_\_\_\_

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# Civil Rights: The Real Policy

## brought to you by . . .



This policy was identified in the commercial you just saw. Please read the policy and answer the question below.

Brought to you by *This Old Policy*.

***Civil Rights Policy: 07.0, Provision of Services to the Handicapped***

**Each Local Agency must have mechanisms in place to make services available to disabled persons. Each local agency will use the state agency's "504 Checklist" to evaluate program accessibility for the disabled.**

**If any clinic sites are not accessible to the disabled, a written local policy will be developed that describes alternative ways that services will be provided.**

Question:

**True or False:**

If a WIC clinic is not handicapped accessible, staff are allowed to refuse services to applicants in wheelchairs because the facility cannot accommodate them.



# Civil Rights: The Real Policy

These four policies were not mentioned in any of the commercials you saw today. Please read the policies and answer the questions below.

## ***CR: 01.0, Participants Rights and Obligations***

**The local agency is required at the time of each certification to have the participant or parent/guardian/caretaker of the participant read, or be read, the rights and obligations of a participant in the WIC program.**

**In Texas, the rights and obligations are spelled out thoroughly on the Supplemental Information Form (SIF). The participant is required to sign and self-date the form. A copy is kept in the participant's record.**

**If a participant does not read English or Spanish, the statement should be provided in a language that the participant can understand.**

**A participant who cannot write can make an "X" or other symbol to acknowledge that he/she has read or been read the information.**

## ***CR:04.0, Civil Rights Compliance Reviews***

**The state agency will monitor each local agency at least once every two years to determine the local agency's compliance with state and federal civil rights policies and legislation.**

## ***CR: 09.0, Collection of Racial/Ethnic Data***

**Each local agency must collect participation data by racial/ethnic category from each participant of the WIC Program. Participants who cannot be visually identified by the local agency employee may be asked to self-identify his/her racial/ethnic group. The employee should explain that the data is being collected for statistical purposes only.**

## ***GA: 09.0, Local Agency Outreach***

**Local agency outreach must be provided through public service announcements about WIC in local media and distribution of WIC information at least twice yearly to organization/agencies who service potentially eligible persons.**



# Civil Rights: The Real Policy

## Questions:

1. True or False: A clinic employee can sign and date the SIF form for a WIC participant.
2. How often are local agencies monitored by the state agency?  
\_\_\_\_\_
3. What kind of participant data must be collected from each participant?
  - a) make and model of their car
  - b) assets and liabilities of each household
  - c) participant's racial/ethnic data
  - d) color of participant's eyes
4. How often must local agency staff distribute WIC information to organizations/agencies who service potentially eligible persons?  
\_\_\_\_\_